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Tax Organizer Checklist

Income

_ Forms W-2 for wages, salaries, and tips
_ All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
_ Rents and royalties
_ Sale of stocks and bonds, etc.
_ Unemployment Income
_ Schedule K-1 from partnerships, S Corporations, estates and trusts, other business income
_ HUD1/Settlement sheet regarding sale, purchase, or refinance of real property
_ Any other income sources not specifically mentioned

Deductions and Credits

_ Medical expenses paid during the year
_ Statements supporting deductions for mortgage interest, taxes, and charitable contributions
_ Child care expenses and the providers name, address, and tax ID number
_ Job-seeking expenses
_ Moving expenses
_ Educational expenses
_ Student loan interest paid
_ IRA and Keogh/SEP plan contributions
_ Closing statements regarding the purchase or sale of any real property
_ Legal papers for adoption, divorce, or separation involving custody of your dependent children
_ Any tax notices sent to you by the IRS or other taxing authority

New Clients

_ Bring a copy of your income tax return from last year
_ Bring Social Security cards for each family member and dependent
_ Bring a list of dates of birth for each family member and dependent

All Clients

_ Bring Driver's License or State ID card for taxpayer and spouse
_ Bring HUD1/Settlement Statement for and House Purchase/Sale or Refinance that occurred during the year.

If you would like a more detailed organizer we can provide you with one.